Nielsen Report on Television

B6670-1-U

Nielsen Television Services

IN THE UNITED STATES . . .

Nielsen Television Index (NTI) provides continuing estimates of TV viewing and national sponsored network program audiences, including national ratings 52 weeks per year. Data regularly reported include persons audiences and household audiences by market sections, Daily Ratings, Fast National and Multi-Network Area Ratings, Cost/1000 Estimates and Program and Brand Cumulative Audiences. In addition, the National Audience Demographics Report provides estimates of audiences by persons categories within household demographics. NTI's on-line multiphase time-sharing computer systems offer clients direct access to a wide range of special analyses.

Nielsen Station Index (NSI) measures television station audiences in over 200 local markets, and provides season-to-season reports (up to seven per market per year), on viewing by time periods and programs. NSI measurements include metro area and Designated Market Area (DMA) ratings, station total audiences, program pre-emptions, cumulative audiences and estimates of viewing over a wide range of demographic categories.

Nielsen Metered Market Service provides daily and weekly reports on television audiences in New York, Los Angeles, Chicago, San Francisco-Oakland, Philadelphia, Detroit, Washington D.C., Boston, Dallas-Ft. Worth and Houston. Other markets such as Miami-Ft. Lauderdale and Denver are scheduled to have metered service in the near future.

Nielsen Homevideo Index (NHI) provides measurement services for the cable television industry and related in-home video forms. This includes audience measurements for the cable satellite networks, local cable systems, pay-TV services and program suppliers.

IN CANADA . . .

Nielsen Broadcast Index (NBI) is the Canadian counterpart of the Nielsen Station Index in the United States. NBI measures television station audiences in the 42 DMA's that comprise the total Canadian national market. NBI report frequency varies from 6-21 weeks, depending on market size. Report book features include demographics, special vs. regular time period listings, trends, cumes, week-by-week ratings and metro area ratings for major reports.

Nielsen Television Index (NTI) publishes network television audience measurement reports for 52 weeks of the year. These reports cover all programs carried on Canadian networks: CBS, CTV, Global, Radio-Canada and TVA.

IN BRAZIL . . .

Nielsen has a majority interest in Audi-TV, the country's only metered television audience research service. The TV panel also uses diaries to obtain information on "who" is viewing.

IN BELGIUM . . .

Diary measurements of national audiences are provided two months per year.

IN COLOMBIA . . .

Diary measurements of urban areas are available on a quarterly basis. There are also optional monthly reports.

IN JAPAN . . .

Nielsen Station Index was established in 1960, and produces Metered Market measurements for the Tokyo, Osaka and Nagoya areas.

Additional copies of this brochure are available at no charge upon request to A.C. Nielsen Company, Nielsen Plaza, Northbrook, Illinois 60062, U.S.A.

The Nielsen data in this booklet are estimates of the audiences and other characteristics of television usage as derived from Nielsen Television Index and Nielsen Station Index measurements. The use of mathematical terms herein should not be regarded as a representation by Nielsen that such measurements are exact to precise mathematical values.

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'85 Nielsen Report on Television

We've reached the midpoint of the 1980's, and our earlier prediction about this being the most exciting and revolutionary decade in television's history is certainly coming true.

Witness the growth in new stations and cable TV, the advent of DBS, earth stations, high definition and stereo TV, home computers and the various home video recording and playback systems. Add to that the new cable network services and specialized services, such as Videotext and Viewdata.

Fortunately, Nielsen has the technology and know-how to report what is happening in television faster and in more detail than ever before. Our research arsenal includes an increased number of metered television markets, new electronic data collection equipment, increased computer capacity and more on-line data services. Projects in test such as our A-C people meter and a new syndicated program tracking system can also provide additional service enhancements. In short, we are dedicated to meeting the challenge of staying at the forefront of television audience research. That is a commitment to those we serve throughout the broadcasting, cable and advertising communities.

Each year we have provided a summary of the television year for our clients and other interested readers. I hope you will find this, our 30th edition, as useful as those we have produced in previous years.

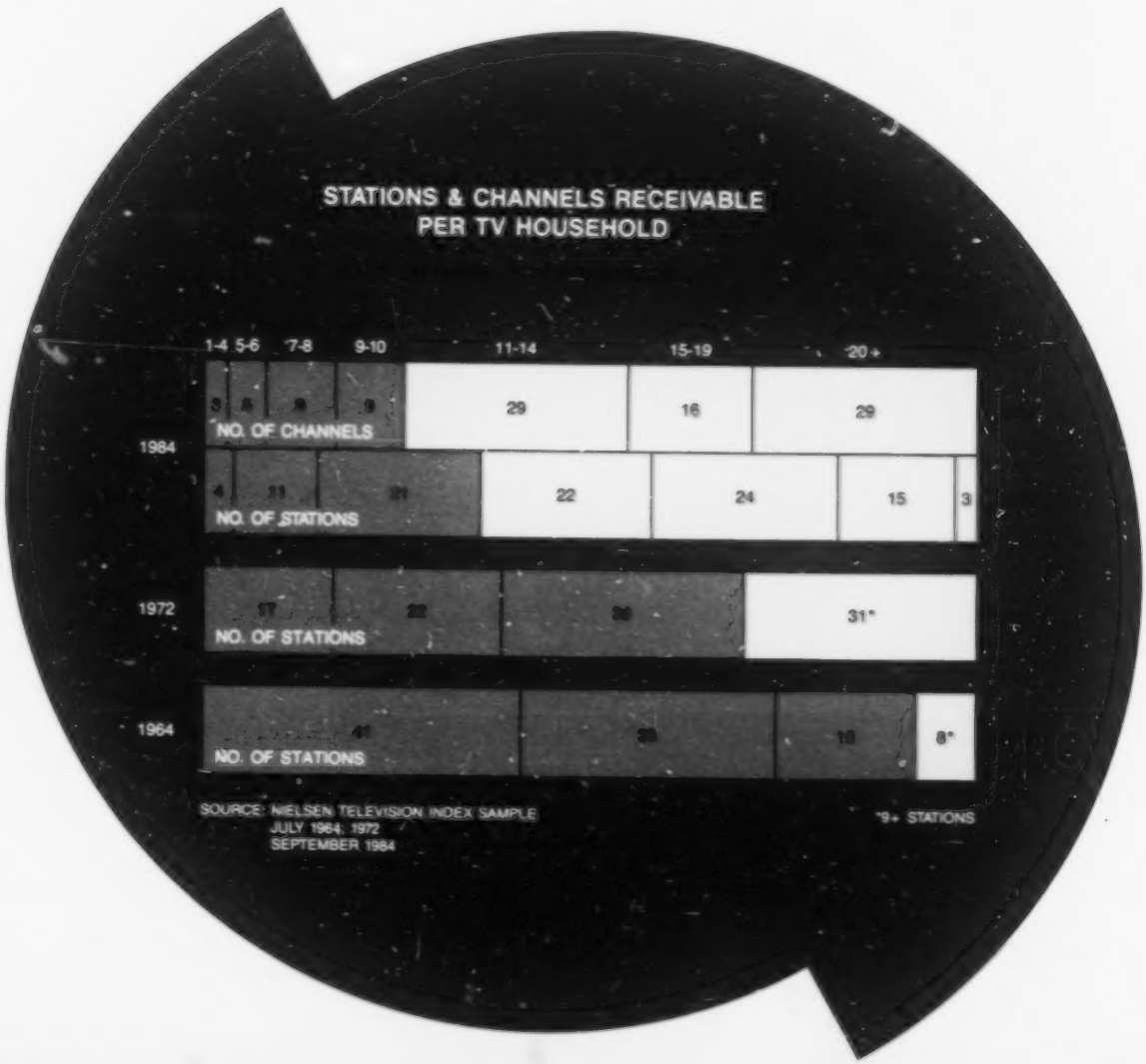
James D. Lyons
President
Media Research Group

More viewing choices

As of January, 1985 according to the Federal Communications Commission, there are 1,194 television stations (904 commercial and 290 public) on the air. In addition, Nielsen Homevideo Index places the number of cable systems in the U.S. at 9,005.

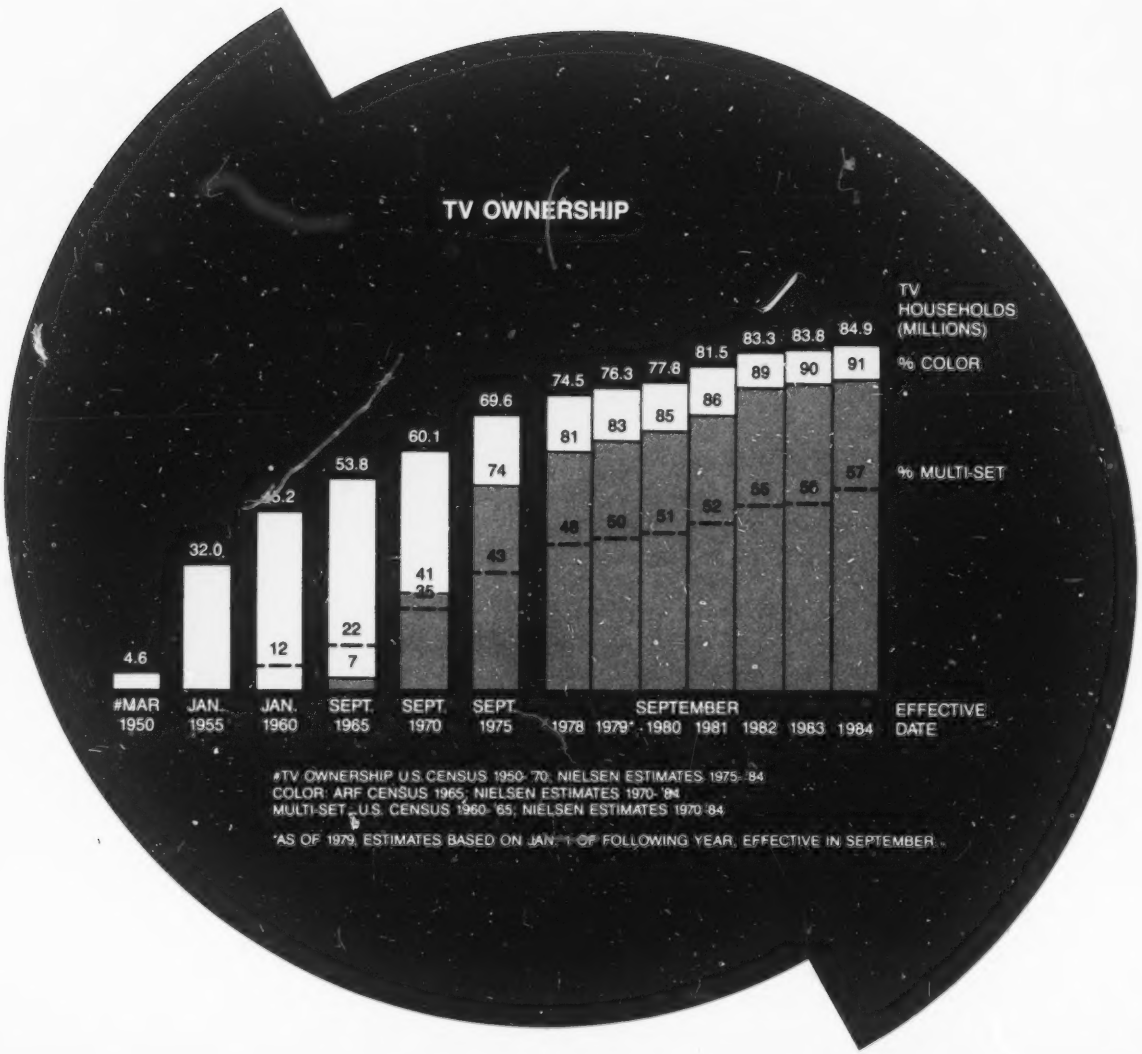
Nielsen Television Index reports, as of September 1984, 64% of U.S. households could receive nine or more TV stations. Only 8% could receive that many stations in 1964.

When cable channels are also included with the over-the-air station channels, the number of available viewing choices is even greater: 83% can receive nine or more channels and 29% can receive 20+ channels.



More TV households

Nielsen estimates that 84.9 million U.S. households owned at least one TV set as of January 1984. 91% of these households had color TV and 57% had two or more sets.

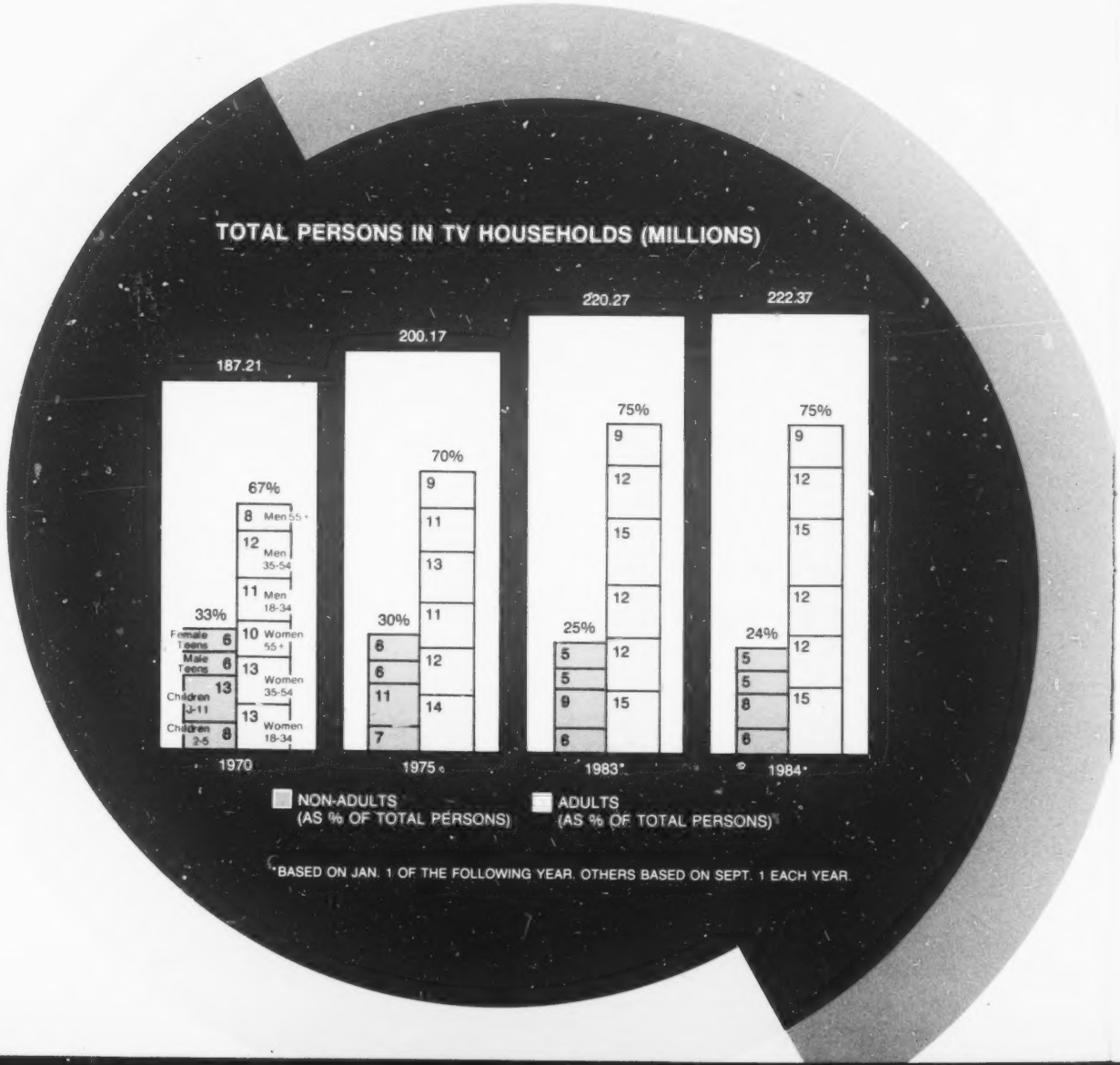


#TV OWNERSHIP U.S. CENSUS 1950-'70, NIELSEN ESTIMATES 1975-'84
COLOR: ARF CENSUS 1965, NIELSEN ESTIMATES 1970-'84
MULTI-SET: U.S. CENSUS 1960-'65, NIELSEN ESTIMATES 1970-'84

*AS OF 1979, ESTIMATES BASED ON JAN. 1 OF FOLLOWING YEAR, EFFECTIVE IN SEPTEMBER.

Adults vs. non-adults in TV households

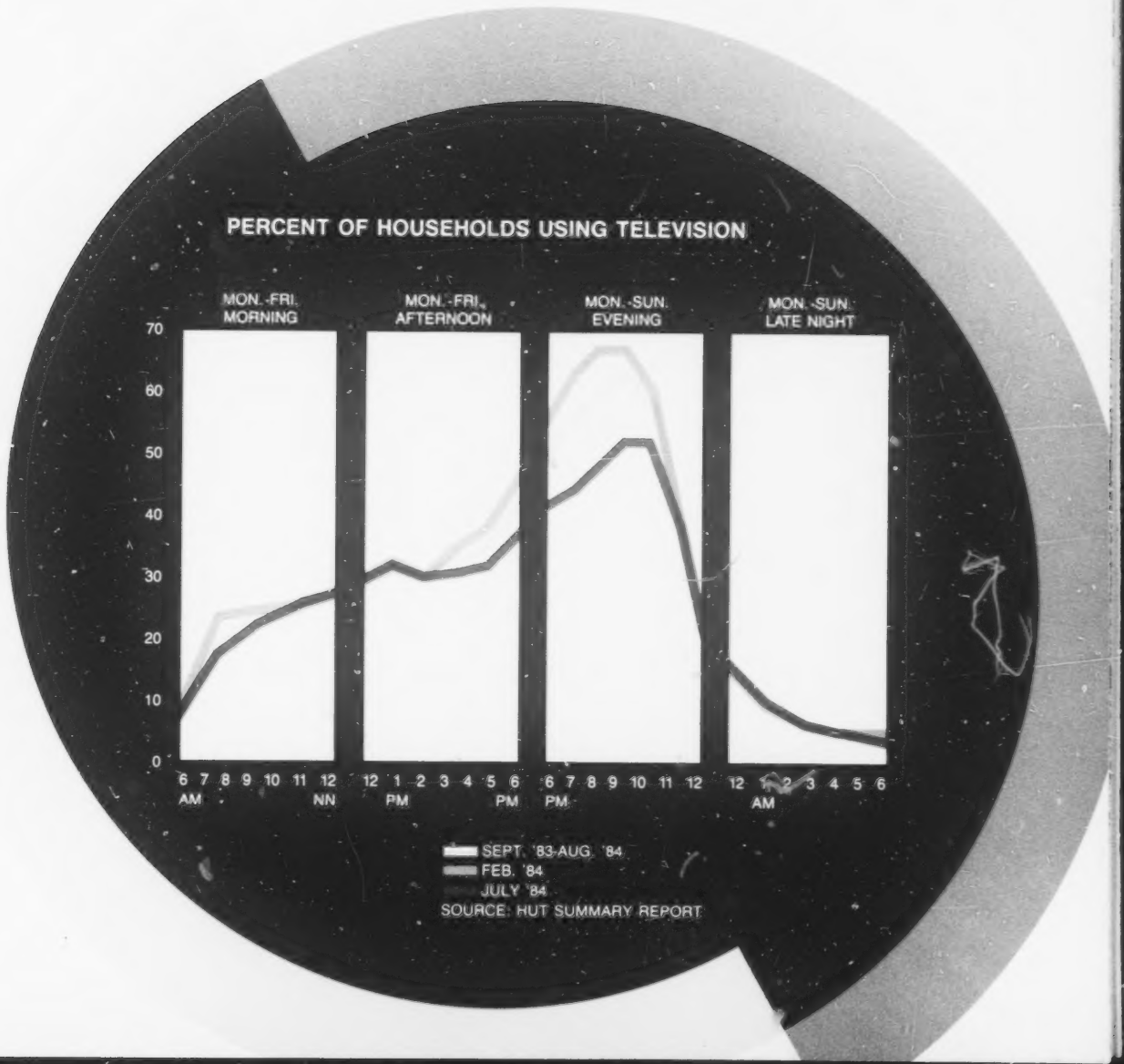
The total number of persons in TV households has increased 19% since 1970, but adult share has risen eight points to 75% while the share of non-adults, particularly children, has declined. This trend, however, seems to have slowed down in recent years.



Peak viewing periods

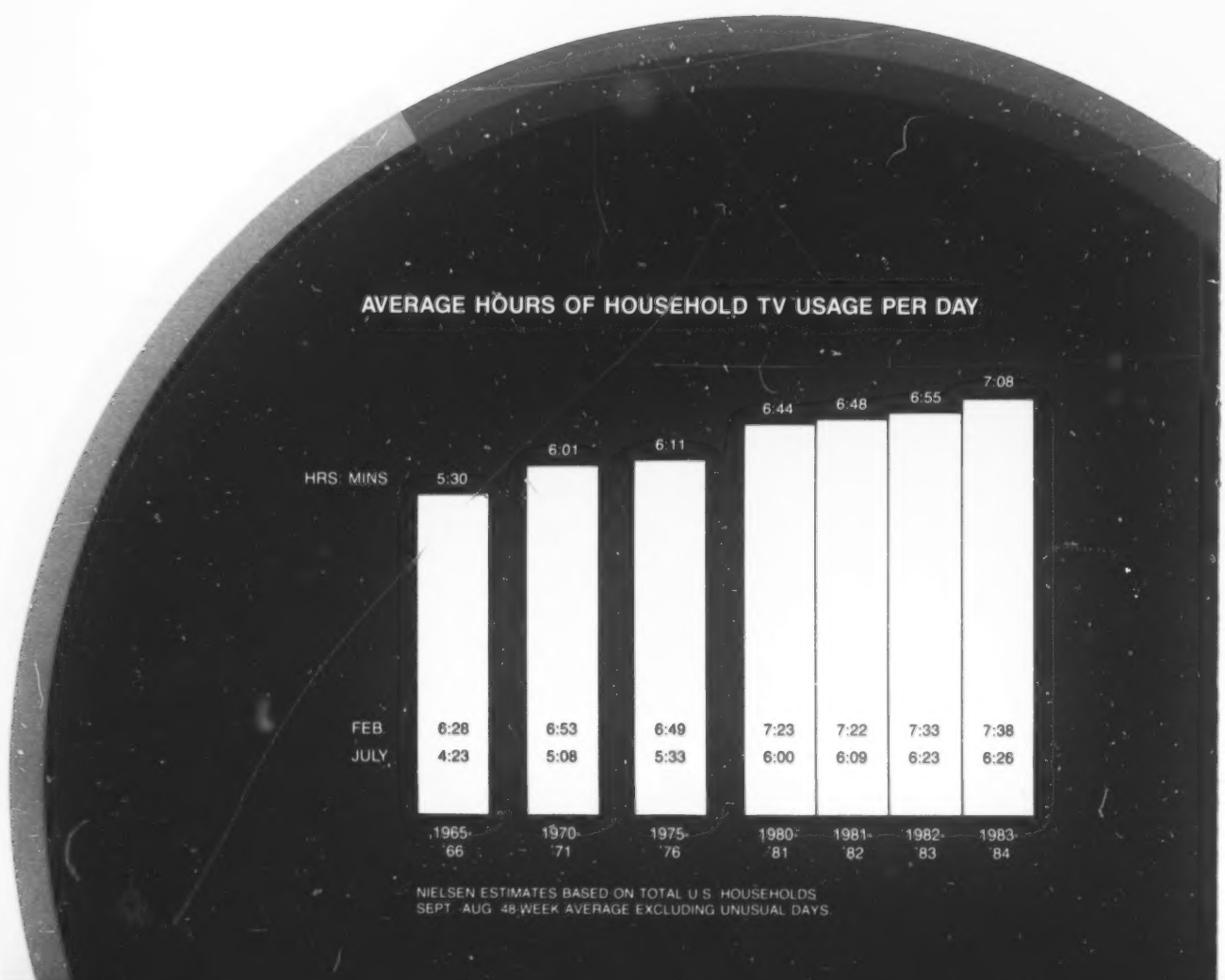
Television viewing increases throughout the day, reaching a peak between 8 and 10 PM, then declines as people retire for the night.

There are some wide variations in TV usage between winter and summer, during late afternoon and early evening. However, there are only minor seasonal differences in early morning and late night.



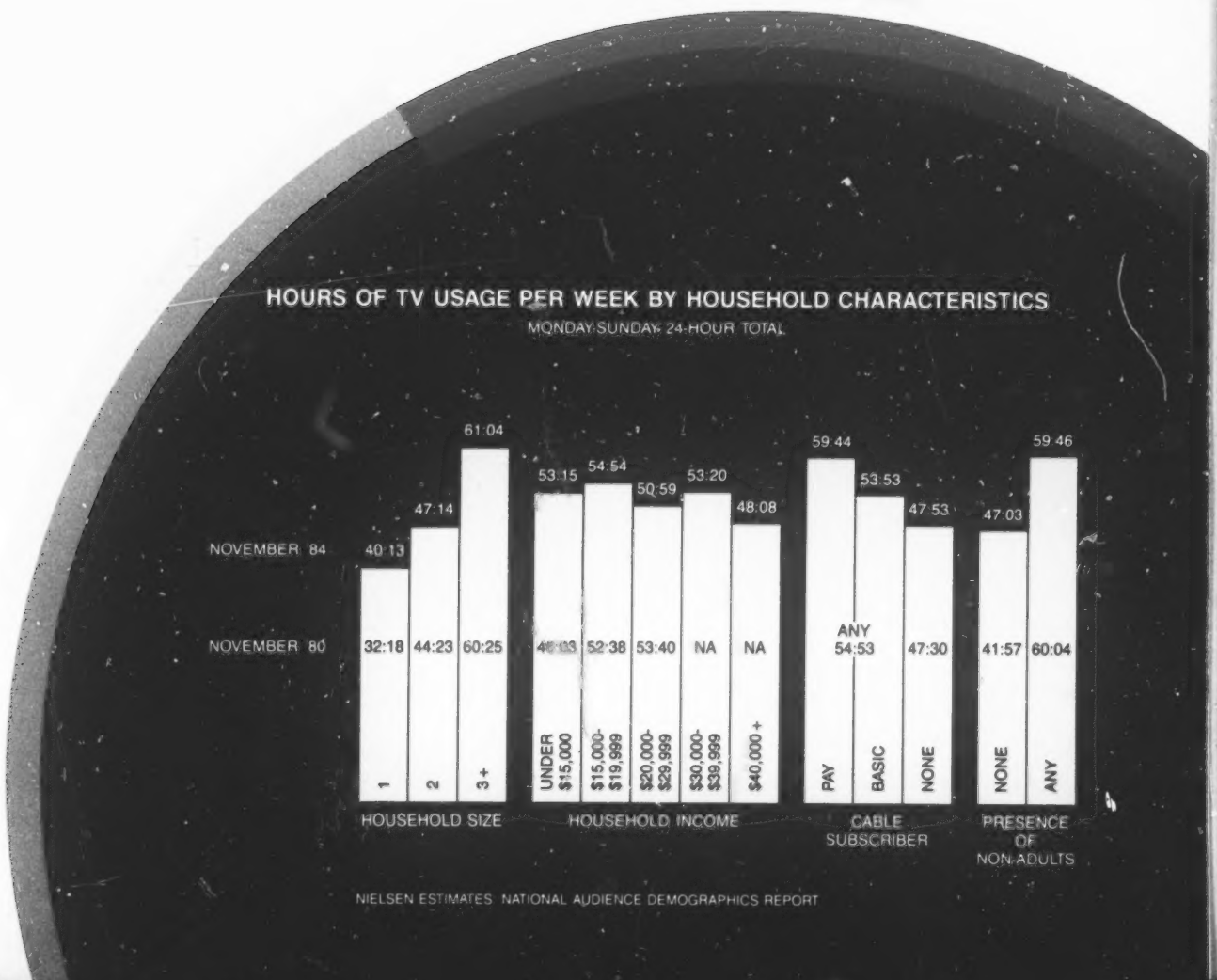
TV usage per day

TV households viewed an average of seven hours and eight minutes a day during the 1983-84 TV season, the highest ever reported. This was a 13-minute increase over the 1982-83 season. February and July (representing high and low viewing periods respectively) also had increases in TV usage.



Household characteristics

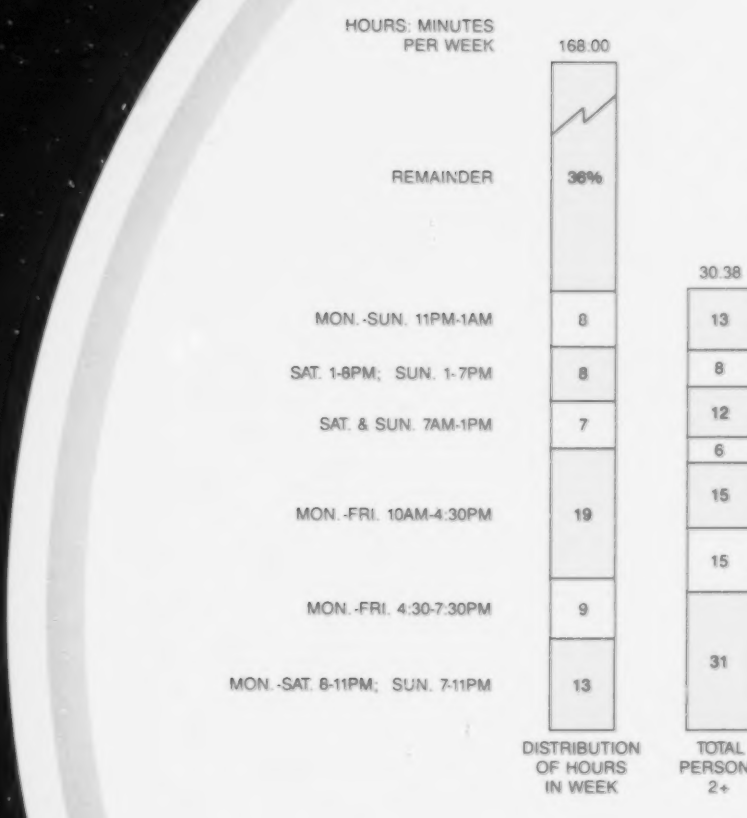
In looking at November 1984, TV households viewed an average of over 52 hours a week. Certain households viewed much more. For example, those households with three or more people tuned in over 61 hours, while pay cable households and households with non-adults were at 59¾ a week. Even the lowest viewing group, single-person households, had their sets on over 40¼ hours a week, more than most people spend working.



Weekly viewing activity

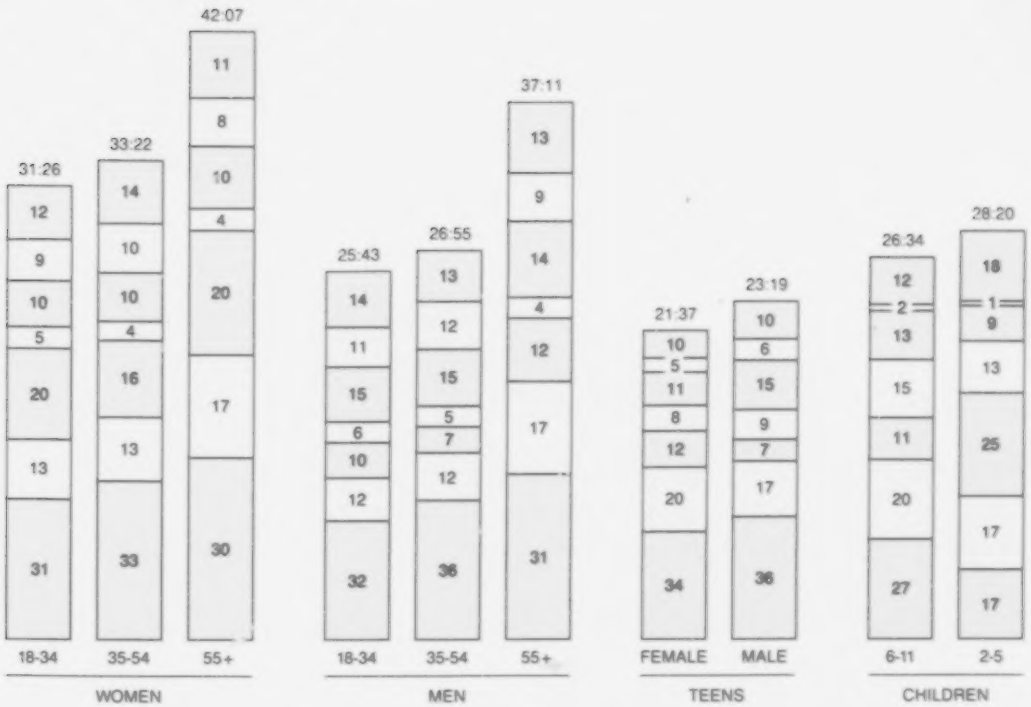
In general, women view more television than men; older adults view more than younger men and women; and younger children view more than older children and teenagers.

All but one of the demographic groups spend the greatest share of their time viewing television during prime time hours. The one exception is children 2-5, who spend the most time viewing weekdays 10 AM to 4:30 PM.



WEEKLY VIEWING ACTIVITY FOR WOMEN, MEN, TEENS AND CHILDREN

NOVEMBER 1984
(FIGURES IN BARS ARE SHARES)



NIELSEN ESTIMATES: NATIONAL AUDIENCE DEMOGRAPHICS REPORT

Prime time viewing

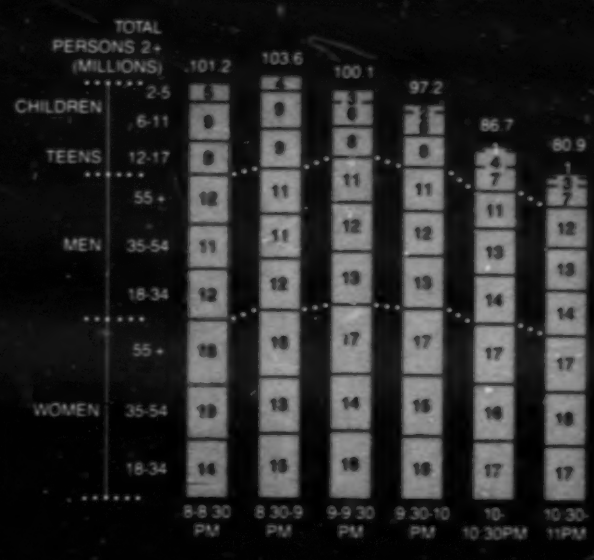
8:30 to 9 PM continues to be the most viewed half-hour evening time period. Women account for the greatest share of viewing during all of these half-hours.

Sunday evening, as in previous years, is the most popular night for viewing television. Thursday has moved into second, replacing Monday, which has dropped back to a third place tie with Tuesday night.

PERSONS VIEWING PRIME TIME

(AVERAGE MINUTE)

BY HALF-HOUR
% SHARE—NOVEMBER 1984



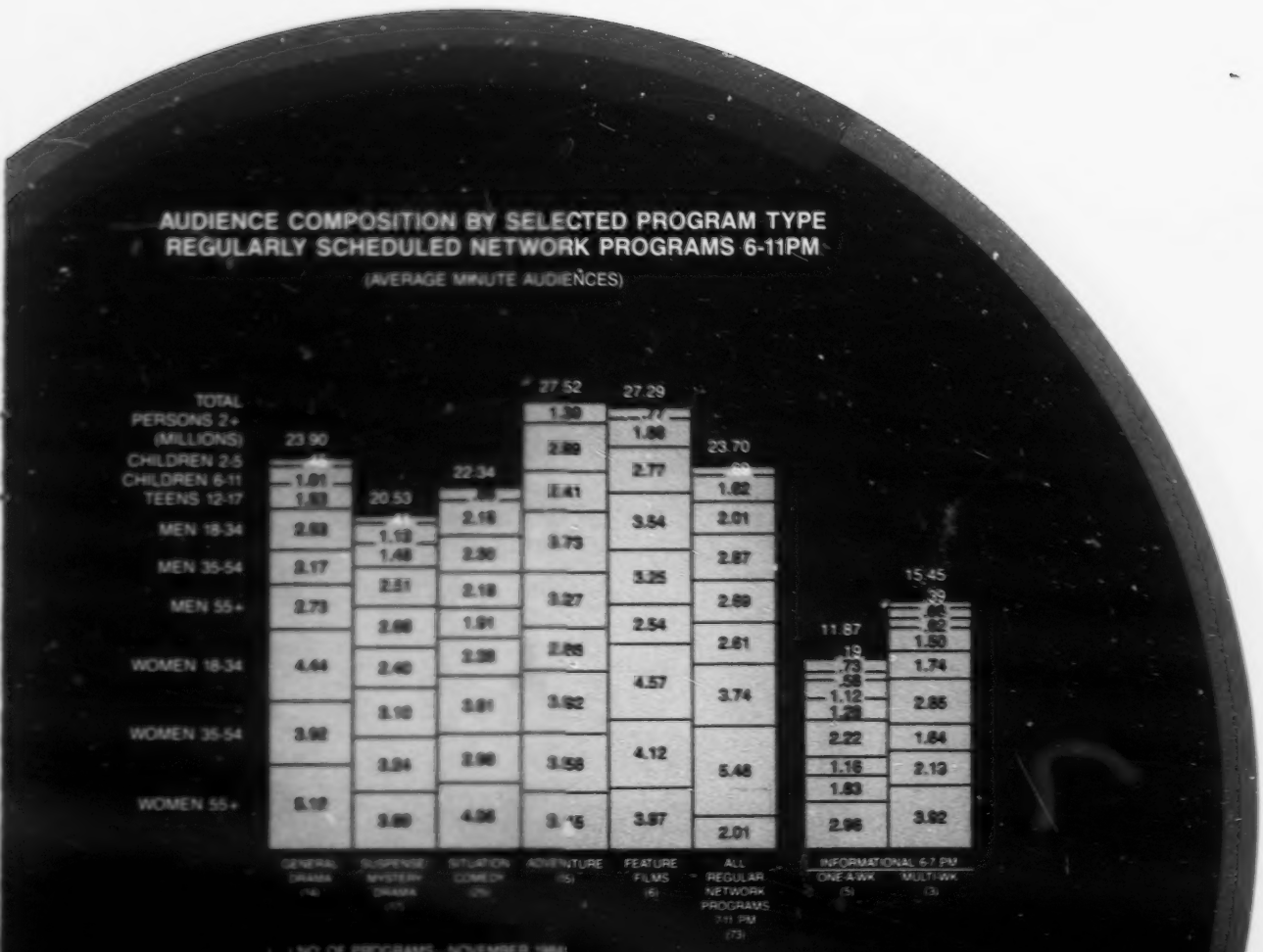
BY NIGHT OF THE WEEK
TOTAL PERSONS 2+ (MILLIONS)
NOVEMBER 1984

8-11PM EASTERN TIME EXCEPT SUNDAY 7-11PM IN '82, 7:30-10:30PM IN '75
EXCLUDING UNUSUAL DAYS

Types of programs viewed

Adventure programming attracted the largest prime time audiences in November, 1984, the same as it did a year ago. Feature films moved up to second from third, replacing suspense/mystery drama, which dropped to last.

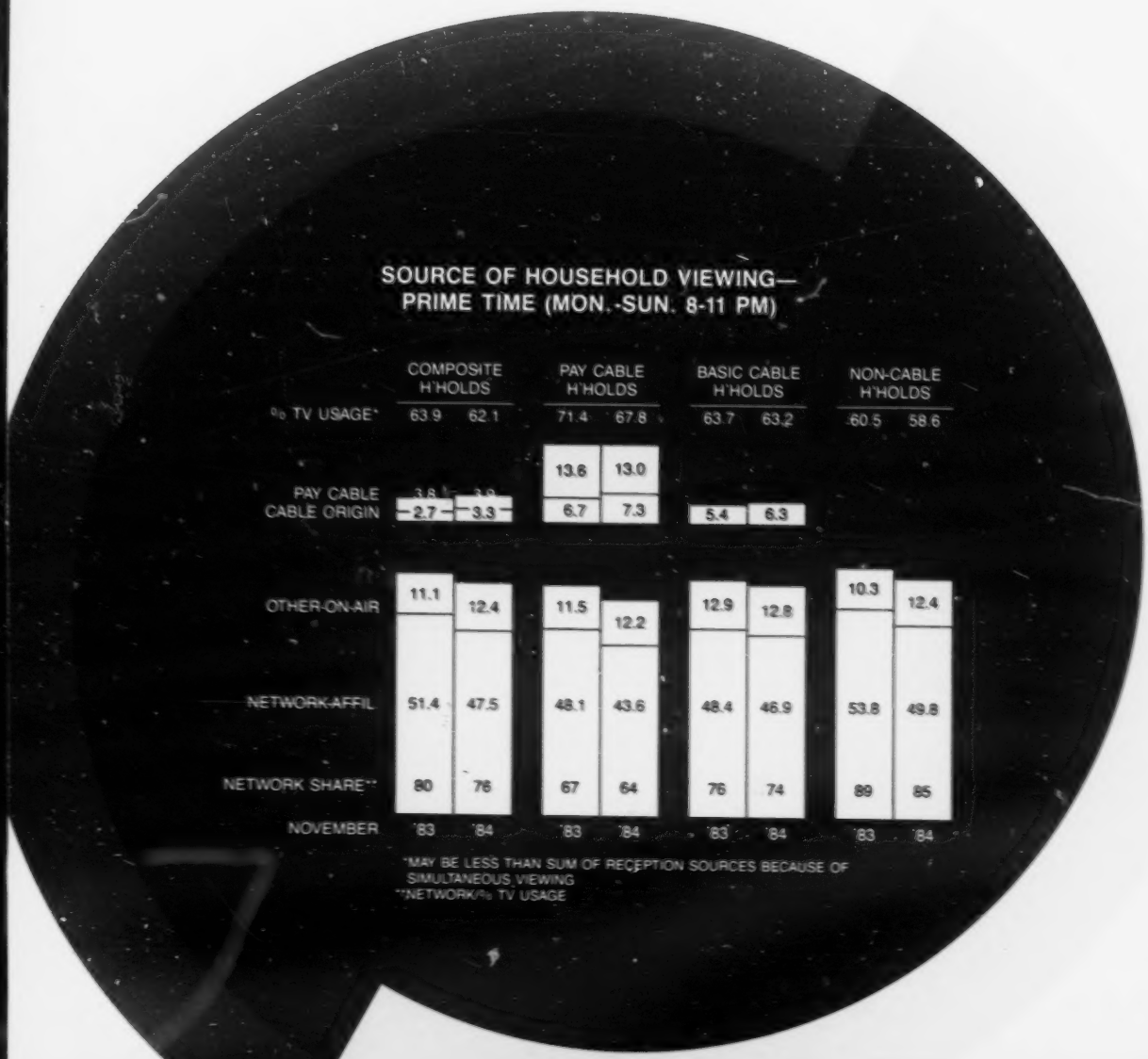
Women 18-34 made up the greatest segment of the audience for both adventure and feature films. Women 55+ had the greatest share of audience for general drama, suspense/mystery drama and situation comedy.



Cable viewing

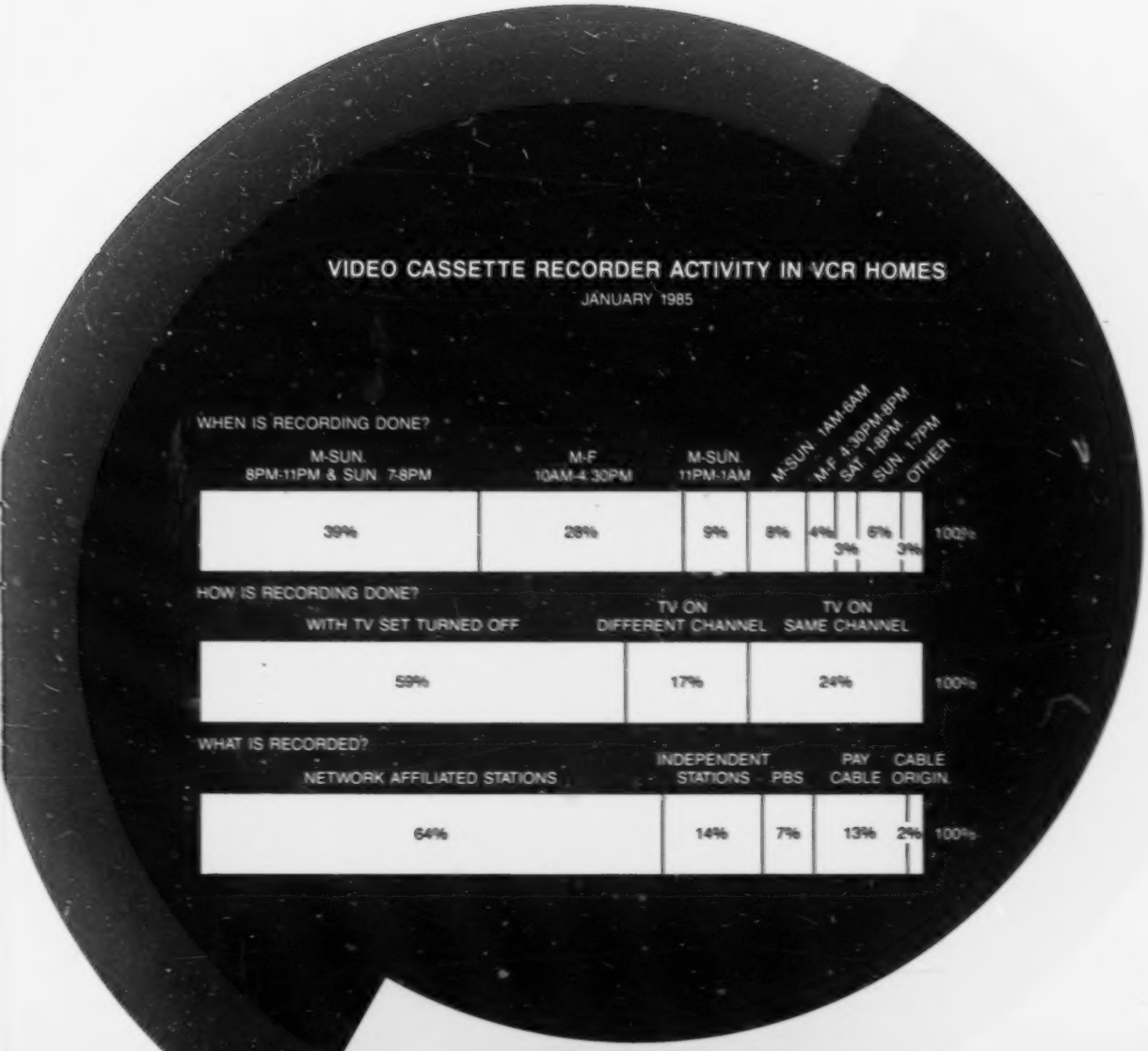
For the most part, those households subscribing to pay cable services view more TV than non-cable or basic cable households.

In looking at prime time, the largest share of viewing (64%) for pay cable households was still to network programs. Pay cable offerings had a 13.0 rating or a 19 share, and non-pay cable originated programming a 7.3 rating or a 10 share.


SOURCE OF HOUSEHOLD VIEWING—
PRIME TIME (MON.-SUN. 8-11 PM)
COMPOSITE H'HOLDS
PAY CABLE H'HOLDS
BASIC CABLE H'HOLDS
NON-CABLE H'HOLDS
% TV USAGE* 63.9 62.1 71.4 67.8 63.7 63.2 60.5 58.6
PAY CABLE 3.8 3.9 13.6 13.0
CABLE ORIGIN 2.7 3.3 6.7 7.3 5.4 6.3
OTHER-ON-AIR 11.1 12.4 11.5 12.2 12.9 12.8 10.3 12.4
NETWORK-AFFIL 51.4 47.5 48.1 43.6 48.4 46.9 53.8 49.8
NETWORK SHARE** 80 76 67 64 76 74 89 85
NOVEMBER '83 '84 '83 '84 '83 '84 '83 '84
*MAY BE LESS THAN SUM OF RECEPTION SOURCES BECAUSE OF SIMULTANEOUS VIEWING
**NETWORK/% TV USAGE

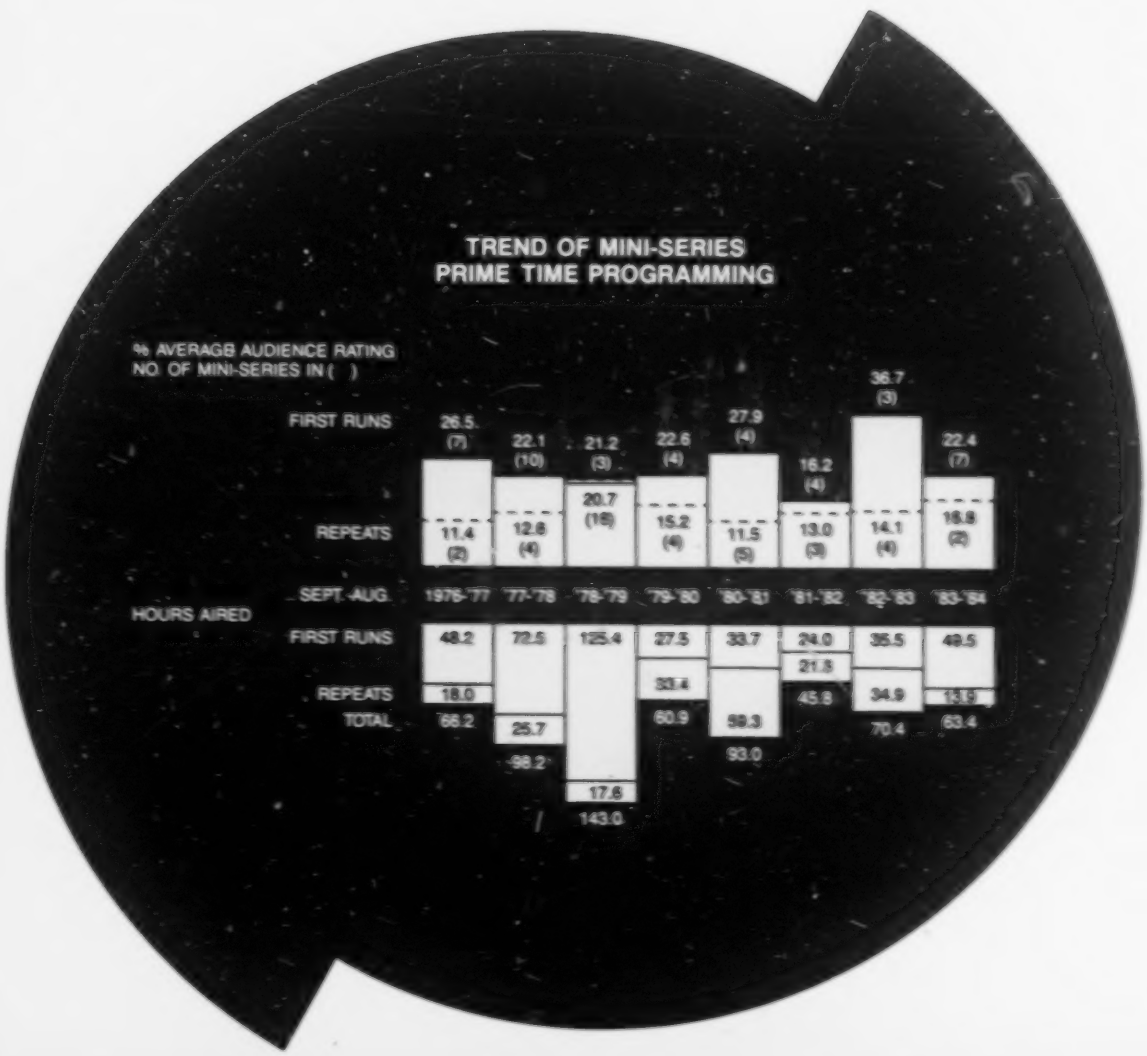
VCR Activity

Video cassette recorder ownership is growing dramatically, bringing with it a new form of television set usage. Recent measurements in the Nielsen Television Index (NTI) sample have shown most recording done during prime time (39%), and weekday daytime (28%). Most recordings are made with the television set turned off, and nearly two-thirds of all the recordings are of programs telecast by network affiliated stations.



Mini-series

The currently popular prime time mini-series programming format is generally accepted to have started with "Rich Man, Poor Man" in early 1976. This new program form burgeoned to seven in the 1976-77 season, peaked with 16 first-run series in the 1978-79 season, dropped down to 3 or 4 in recent years, and recovered to 7 in 1983-84. Except for 1981-82, the average audience levels have always exceeded 21%.



Syndicated Programs

There are nearly 450 different syndicated commercial programs scheduled at various times on both network affiliated and independent stations. Many of these programs were on network TV at one time, while others were made exclusively for local scheduling.

This list shows the top 20 syndicated programs in November 1984, ranked by their average Household rating within the area in which they could be viewed. Wide variances can be seen in the number of markets in which they were telecast and the % of U.S. TV Households which could view these programs (% coverage). Consequently, the coverage of a syndicated program must be considered as well as its rating when gauging the overall impact on a total U.S. basis.

TOP RANKING SYNDICATED PROGRAMS

November 1984

Rank	Program	% Rating	Share	# Markets	% Coverage
1	Wheel of Fortune	16.4	29	179	98.1
2	Southwest Conf FTBL	10.7	35	19	7.4
3	Women of Russia	10.4	16	9	12.6
4	M.A.S.H.	10.0	22	164	86.8
5	Three's Company	9.6	21	167	95.2
6	Entertainment Tonight	8.7	17	141	90.4
7	Family Feud PM	8.4	16	111	72.3
8	PM Magazine	8.2	15	87	69.1
9	Hee Haw	7.9	18	169	83.5
10	People's Court	7.8	20	169	95.9
11	Jeffersons	7.7	18	125	81.9
12	Different Strokes	7.6	17	85	58.3
13	Fight Back	7.6	16	26	36.1
14	Mickey Donald Goofy	7.3	18	14	10.5
15	ACC Football	7.2	27	17	10.4
16	Jeopardy	7.2	21	116	79.9
17	Benson	7.0	15	42	37.4
18	Dance Fever	6.6	15	93	75.2
19	Name That Tune	6.5	14	96	74.9
20	Archie Bunker's Place	6.4	13	11	16.0

Top ten by markets

The top ten nationally ranked prime evening network programs in November, 1984 also showed up in one or more of the nine largest markets where Nielsen has metered measurements of TV audiences. Each market, however, had its own distinctive list which included one or more programs not found on either the national or other major market lists.

TOP TEN NETWORK PROGRAMS BASED ON NOVEMBER 1984 4 WEEK AVERAGE AS COMPUTED BY NIELSEN STATION INDEX

PRIME TIME PROGRAMS	Rank-AA% U.S.*	New York	L.A.	Chicago	Philadelphia	San Francisco	Boston	Detroit	Washington, D.C.	Dallas Ft. Worth
ABC Sun. Night Movie	10-20.1			6-23.0				5-26.6		
A Team	6-21.1							8-24.6		
Bill Cosby Show	10-20.1	6-21.9	6-18.5	7-22.3	3-23.0		6-19.4		3-24.0	
Cagney & Lacey							8-18.7			
Cheers		9-20.5		10-21.9	7-21.8				8-22.8	
Dallas	1-25.6		3-19.1	5-23.3	8-21.7	3-22.4		10-23.9	1-27.5	2-26.3
Dynasty	2-24.7	2-26.2	5-19.0	2-25.4	1-26.9	5-21.9	2-22.9	1-30.0	3-24.0	1-27.4
Ellis Island, Pt. 1 (S)	4-23.4	1-27.5	2-21.2	4-23.4	4-22.8	2-26.1	3-22.3	2-28.3	5-23.7	10-20.0
Ellis Island, Pt. 2 (S)	6-21.1	3-25.6				4-22.3	5-21.3		9-21.3	
Ellis Island, Pt. 3 (S)		4-24.3				8-19.0				
Falcon Crest	8-20.5								10-20.8	8-20.3
Family Ties			9-17.7	8-22.1	10-21.1				6-23.4	
Funniest Joke (S)										7-20.7
Hill Street Blues		5-22.8	9-17.7	3-23.9		9-18.1	9-18.6	7-24.8		
Hotel		8-20.8			9-21.3			6-26.3		5-22.6
Johnny Carson			7-18.3	8-22.1	2-23.4	6-21.1	10-18.4			
Mon. Night Football									7-23.2	4-23.5
Murder, She Wrote			3-19.1			7-19.4				
NBC Mon. Night Movies	5-22.7	7-21.8	8-18.1	1-25.7	6-22.2	10-17.2	4-21.7	4-26.9		9-20.2
NBC Sat. Movie-Wk.								3-27.0		
Simon & Simon	9-20.3									
60 Minutes	3-23.9	9-20.5	1-24.0		4-22.8	1-27.5	1-25.1		2-26.1	3-25.0
TV Bloop. & Prac. Jokes							7-19.0	9-24.2		6-22.5

*NIELSEN TELEVISION INDEX DATA FOR MATCHING NIELSEN STATION INDEX DATES OF NOVEMBER 1-28, 1984
(S) SPECIAL

Top 15 network programs

Many different programs rank in network television's top 15 in the course of a year. Those shown here were the regular network programs that ranked at the top during Nielsen Television Index measurements, from October 29-November 25, 1984.

The size of a program's audience is but one of the number of ways to assess its worth or success. For example, many programs below the top 15 may be considered successful because they appeal to a specific target audience that network advertisers want to reach.

TOP 15 REGULARLY SCHEDULED NETWORK PROGRAMS

NOVEMBER 1984
Nielsen Average Audience Estimates
2 or More Telecasts
(15 Minutes or Longer)

TOTAL U.S. HOUSEHOLDS

	Program Name	Average Audience %
1	Dallas	25.6
2	Dynasty	24.6
3	60 Minutes	23.9
4	NBC Monday Night Movies	23.0
5	Simon & Simon	20.9
6	A Team	20.6
7	Falcon Crest	20.5
8	ABC Sunday Night Movie	20.1
9	Bill Cosby Show	20.1
10	Hotel	19.4
11	Magnum, P.I.	19.1
12	Knots Landing	18.9
13	NBC Sunday Night Movie	18.8
14	Murder, She Wrote	18.6
15	Family Ties	18.4

MEN 18+

	Program Name	Average Audience %
1	60 Minutes	17.6
2	ABC Sunday Night Movie	16.5
3	NFL Football Game 2-NBC	16.1
4	NFL Monday Night Football	15.3
5	A Team	15.2
6	Dynasty	14.5
7	Hill Street Blues	14.2
8	CBS NFL Football Game 1	14.2
9	CBS NFL Football Game 2	13.6
10	Dallas	13.6
11	Hardcastle & McCormick	13.6
12	Magnum, P.I.	13.4
13	Simon & Simon	12.8
14	Fall Guy	12.7
15	NBC Monday Night Movies	12.6

WOMEN 18+

	Program Name	Average Audience %
1	Dallas	23.0
2	Dynasty	22.7
3	NBC Monday Night Movies	19.5
4	Falcon Crest	18.6
5	60 Minutes	18.1
6	Hotel	18.0
7	Bill Cosby Show	17.5
8	Knots Landing	17.0
9	Simon & Simon	16.8
10	Murder, She Wrote	16.0
11	Family Ties	15.6
12	NBC Sunday Night Movie	15.6
13	ABC Sunday Night Movie	15.5
14	A Team	15.3
15	Magnum, P.I.	14.8

TEENS 12-17

	Program Name	Average Audience %
1	Bill Cosby Show	22.7
2	Family Ties	21.6
3	ABC Sunday Night Movie	20.4
4	Diff'rent Strokes-Sat.	19.0
5	TV Bloopers & Prac. Jokes	18.3
6	Gimme A Break	17.5
7	NBC Monday Night Movies	17.3
8	V	16.3
9	Knight Rider	15.7
10	Facts of Life	14.8
11	A Team	14.7
12	Cheers	14.2
13	It's Your Move	13.3
14	Hardcastle & McCormick	12.2
15	Who's The Boss	11.9

CHILDREN 2-11

	Program Name	Average Audience %
1	Knight Rider	24.2
2	Smurfs III	23.9
3	Alvin and the Chipmunks	22.2
4	Smurfs II	21.1
5	Diff'rent Strokes-Sat.	19.5
6	Bill Cosby Show	18.5
7	Gimme A Break	18.3
8	Muppet Babies	18.2
9	V	17.9
10	Family Ties	17.3
11	ABC Sunday Night Movie	16.2
12	Kidd Video	15.0
13	Turbo Teen	14.7
14	Smurfs I	14.5
15	Dungeons and Dragons	14.4

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